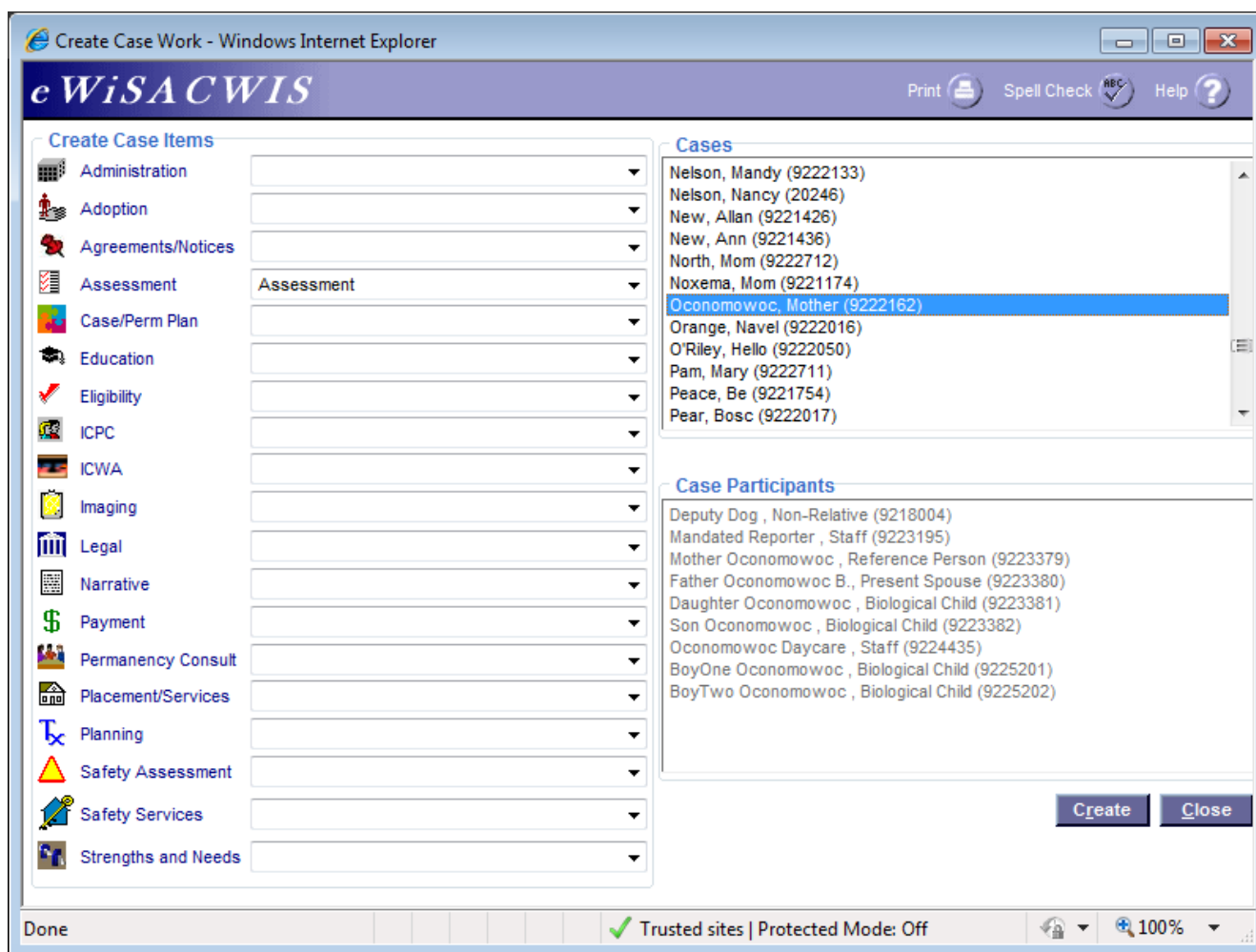# Initial Assessment – Primary

Note: If you are an Alternative Response county, see the Alternative Response Quick Reference Guide.
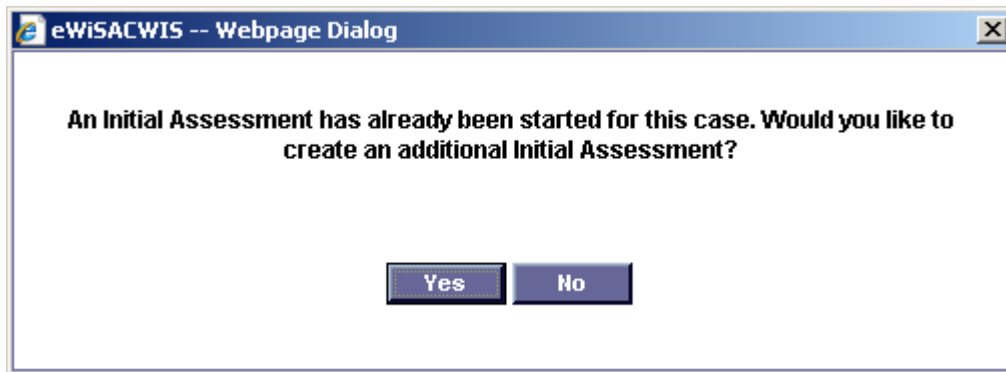
Note: In order to create an Initial Assessment – Primary, an assignment to the case is needed.

1. From the desktop, click Create > Case Work or click the Case Work hot button ![Case Work]. This will open the Create Case Work page.

2. On the Create Case Work page, select Assessment from the Assessment drop-down, and then select the family from the Cases group box. Click Create.

3. If a pending assessment exists, you will receive the following message:

Clicking Yes will open the Assessment Report Link page. Clicking No will close the message and return you to your desktop.

4. If a pending assessment does not exist, the Assessment Report Link page will open. This page will show all screened-in CPS Reports that are available to be linked to an Assessment. Select the checkbox for the CPS Report(s) that will be linked to this Assessment. Click the Continue button.

5. The Assessment page opens to the Participants tab. Click the Roles hyperlink to add the role of Alleged Maltreater to the appropriate participants. At this time, you may also add additional active case participants by choosing the Insert button. Select the Create/View ICWA Record hyperlink to complete the Child's ICWA record.

6. Click on the Basic tab. Select the Living Arrangement of the Child(ren) option that is most applicable. Next, select up to three Family Characteristics/Conditions. The first drop-down is required. If there are no applicable characteristics or conditions, select 'None Observed.'

7. The Allegations tab will pre-fill with the allegations documented on the CPS Report.

   o Complete the allegation(s) by selecting the Edit hyperlink, which will open the Allegation (Assessment) page. When completing an existing allegation that was entered on the Access Report page, enter a maltreatment determination, date of maltreatment, answer the medical treatment question, and if the allegation is a serious incident identify the type of serious incident. Select the maltreatment determination.

   o Add any additional allegations using the 'Insert' button located in the lower-right corner of the Allegations group box, which will open the Allegation (Assessment) page (see the following steps to insert a new allegation).

8. When inserting a new allegation, select an Alleged Victim from the drop-down. Select the type of abuse or neglect from the Abuse/Neglect Code drop-down.

9. Select the Description hyperlink. This will open the Description page. Select up to three values that apply and click Continue.

10. Enter the Date or Approximate Date of Alleged Maltreatment. Answer the question if the alleged maltreatment occurred while the child's residence was an out of home care placement.

11. Select whether the alleged maltreatment resulted in a serious incident. If 'Yes,' select the appropriate checkboxes related to the Serious Incident. You can click on the DCF memo 2010-01 hyperlink to access the memo regarding Child Welfare Public Disclosure 2009 Wisconsin Act 78. To access the 2009 Wisconsin Act 78, select the Act 78 hyperlink.

    Note: If a death has occurred, see the section "Recording a Date of Death for a Child" of this guide.

12. Click Save and Close to return to the Assessment page.

13. On the Allegations tab on the Assessment page, complete the Maltreater(s) group box.

- o Each allegation may have different maltreaters. Select the radio button next to the allegation to view the maltreater(s) for that allegation.
- o There must be at least one substantiated maltreater when the maltreatment has been substantiated.
- o If maltreatment is unsubstantiated, all maltreaters will default to unsubstantiated.
- o Only individuals that were given the role of Alleged Maltreater on the Participants tab will be available in the Alleged Maltreater drop-down.
- o Additional Maltreaters for an allegation are added using the Insert button in the Maltreater(s) group box. For example, when both parents are alleged maltreaters, only one maltreater row will exist from the access report. Insert an additional row for the second parent.

14. The Contacts tab is view only, displaying the linked Assessment Contacts. In this example, there aren't any. See the 'Assessment Contact' and 'Initial Face to Face Contact' Quick Reference Guides for more information.

15. The Results tab is mostly view only and pre-fills information from the Initial Assessment – Primary and the Safety Assessment, Analysis and Plan when those are completed. Select the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Notes page.

Note: After the page is saved, the Initial Face-to-Face Contact Information automatically calculates when the Initial Face-to-Face Must Occur By.

The Category and Type will pre-fill as an Initial Assessment Contact with Type of Initial Face-to-Face. Complete the remainder of this page accordingly. Select Save and then Close. You will return to the Results tab of the Assessment page.

When you return to the Assessment page, it displays when the initial face-to-face contact was documented. Inclusion of this functionality is to help ensure workers complete and document the initial face-to-face contact in a timely and accurate manner.

16. If allegations rise to the level of a serious Incident, Wisconsin Act 78 requires county agencies and the Bureau of Milwaukee Child Welfare (BMCW) to report these incidents to the Division of Safety & Permanence (DSP) within 2 working days of the agency learning about the incident. To notify the DSP of a serious incident allegation, select Serious Incident Notification from the Options drop-down on the Results tab and complete the Serious Incident Notification page.

    The Serious Incident Notification page is a combination of user-entered and pre-filled information. The Name – County or State Agency pre-fills with the county of the worker, but can be edited.

    Enter the Name – Agency Contact Person, Title, and Phone for the agency contact.

    The Case Name, Case ID, Date of Incident, Number of Children Involved in This Incident, Check all that apply, and Child Information will pre-fill from the Allegation (Assessment) page on the Allegations tab of the Assessment page.

    If the Serious Injury checkbox is selected, answer the 'For "Serious Injury," did a physician confirm the child's condition as serious or critical?' question.

    Select the appropriate checkbox in the 'Check one to describe current case status at the time of the incident' group box.

The three narrative fields in the Narrative group box are also required. The 'Additional Information' narrative field is optional. Choose the 'Yes' or 'No' radio button to the statement, 'Child, family, or alleged maltreater is known to child welfare.'

Once all fields have been completed, select the 'Send Serious Incident Notification to DCF' checkbox at the top and click 'Save' to send the Serious Incident Notification to DSP. DSP will receive an e-mail for the serious incident.

The Serious Incident Verification expando may be expanded at any time. The fields under this expando become enabled only after the 'Send Serious Incident Notification to DCF' checkbox has been checked. DSP will review the Serious Incident Notification and will document their findings in this area. Click Close to return to the Assessment page.

Note: See the section at the end of this guide for the 90-day Summary Report.

17. On the Basic tab under the Options drop-down, select IA Primary and click 'Go.'

The following message will appear. Click 'Yes' to continue to the IA – Primary or 'No' if you want to return to the Assessment page and not save.

18. The Initial Assessment - Primary page will open to the Part. Info (Participant Info) tab. This is where the child(ren) and adult(s) that are part of the assessment are added. Use the Add/Edit buttons in each group box to add the participants. The Add/Edit button opens the Case Participants/Collaterals page.

19. Select the checkbox next to the participant to be added to the assessment. Select Continue.

20. On the Maltreatment tab, answer the safety questions pertaining to the alleged maltreatment. Document the narrative information regarding the Maltreatment and Surrounding Circumstances.

21. Next is the ChildFunctng (Child Functioning) tab. Answer the safety questions and complete the narrative. Each child identified on the Part. Info tab will have a required narrative section.

22. The AdultFnctng (Adult Functioning) tab is very similar to the Maltreatment and ChildFnctng tabs. Answer the corresponding safety questions and complete the narrative regarding the functioning of each adult identified on the Part. Info tab.

23. The Parental Practices tab is similar to the previous tabs. After the safety questions, there are three narrative areas to complete. Disciplinary Approaches and Parenting Practices narratives are completed for each adult. The Family Functioning narrative is completed once for the family as a whole.

24. The Summary tab is the last tab of the Initial Assessment – Primary page. Document the Family Support Network information if the case is being opened for services, otherwise complete the Closing Summary. Complete the Case Disposition information.

25. The Summary tab also contains a Correspondence group box. This includes the Mandated Reporter and Relative Reporter group boxes. These documents are available under the Options drop-down of the Assessment page.

26. Return to the Part. Info tab. Under the Options drop-down, there are two choices available: Safety Assessment, Analysis and Plan and Initial Assessment Primary. Select Safety Assessment, Analysis and Plan and click 'Go.' If you do not see the Safety Assessment, Analysis and Plan option, click 'Save' on the Initial Assessment – Primary page and the option will be available.

27. The Safety Assessment, Analysis and Plan page will open, and the Part. Info tab will pre-fill with the same participants identified in the Part. Info tab of the Initial Assessment – Primary page. Select Add/Edit if changes need to be made regarding the identified participants.

28. The Safety Assessment tab contains all 11 safety questions that were answered as part of the Initial Assessment – Primary. Make any necessary changes and scroll down to the Safety Assessment and Conclusion group box. Enter the Date of Safety Assessment, and for BMCW workers, complete the BMCW Safety Services group box as applicable.

- If all safety questions are answered 'No,' enter the date of the safety assessment, open the Safety Assessment template from the Options drop-down, check the Completed checkbox in the upper right-hand corner, and click Save and Close to return to the Initial Assessment – Primary page. Proceed to step 37 of this guide.
- If any safety question is answered yes, proceed to the next step.

29. The Description of Safety Threats tab displays the Safety Threats selected on the previous tab, with required narrative text to describe each identified safety threat. The Services Available/Accessible group box questions are view only on this tab.

Safety Assessment, Analysis and Plan -- Webpage Dialog				

eWiSACWIS TM Print Spell Check Help

General
Name: Mother Oconomowoc   Worker: Caitlin M. Cake   Approval Date: Type: Initial Assessment Primary   ☐ Completed

Part. Info	Safety Assessment	**Description of Safety Threats**	Plan Analysis

Safety Threats
Specifically describe the family conditions that support the safety threats identified. If any evaluations such as Psychological, Medical/AODA evaluations are needed to understand the conditions that affect safety, describe those here.

One or both parents/caregivers lack parenting knowledge, skills, or motivation necessary to assure the child's basic needs are met.   Row 1 of 2
Description:
Description of safety threat...

The child is profoundly fearful of the home situation or people within the home.   Row 2 of 2
Description:
Description of safety threat...

Services Available/Accessible
All Needed Services/activities provided.   ○ Yes   ○ No
All Needed Services/activities/providers are available at level/time required.   ○ Yes   ○ No

Options: [▾] Go   Save   Close

30. The Plan Analysis tab contains several questions. How you answer 'Can and will the non-maltreating parent or another adult in the home protect the child(ren)?' will affect how the rest of this tab works. If you answer 'Yes,' the corresponding narrative becomes required and the Analysis questions are disabled. If you answer 'No' or 'N/A,' the narrative is disabled and the Analysis questions are enabled and required.

31. If all of the Analysis questions are answered 'Yes,' you will receive the following message. Selecting 'Yes' will take you to the Plan Analysis tab to enter the In-Home Services that will be implemented to ensure safety of the child(ren) in the home. Selecting 'No' returns you to the Plan Analysis tab.

32. If one or more of the Analysis questions are answered 'No,' the following message will appear directing you to complete a Confirming Safe Environments:
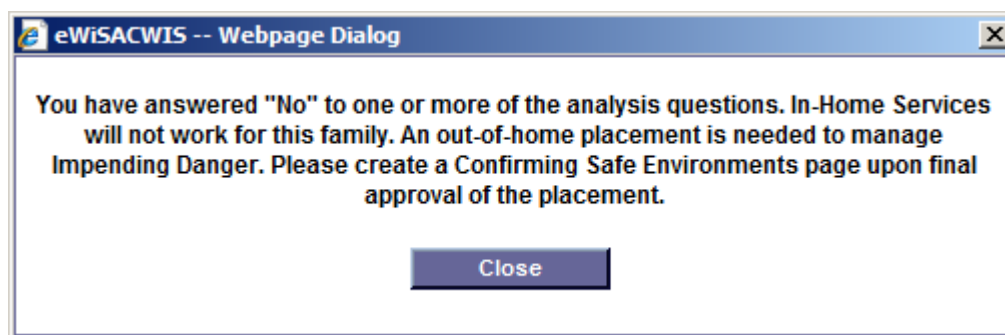
33. If in-home services may work for this family, enter the services that will be implemented by clicking the Add/Edit Services hyperlink on the Description of Safety Threats tab.

34. Clicking the Add/Edit Services link will prompt you with the following message. Click 'Yes' to save and continue or 'No' to return to the Safety Assessment, Analysis and Plan page without saving.
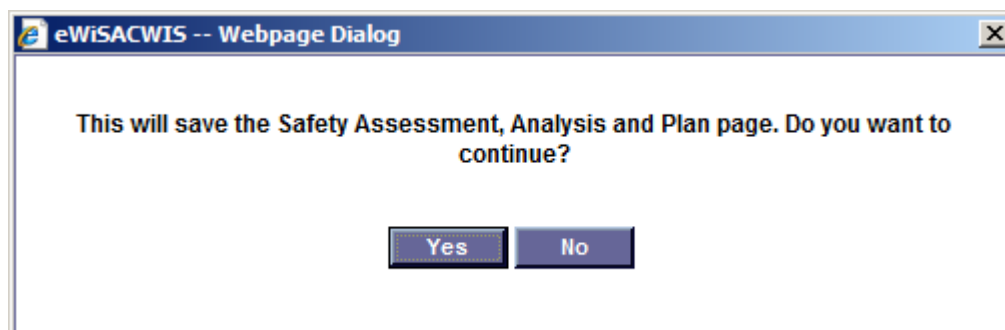
35. The Safety Plan Services page will open, displaying the identified safety factor, the description why that factor was selected, and an empty Safety Services group box. Click the Insert button to insert a service. Select the appropriate Service/Activity that is being implemented to address the safety factor, enter the name of the provider or responsible person providing the service, any additional information about the service being provided, and answer the two questions about the service and provider being available. Click the Insert button again to add as many services being established to address this safety factor. When all services are entered, click Save and then Close.

36. The Service/Activity and Provider/Responsible Person displays on the Description of Safety Threats tab. The Services Available/Accessible questions now have answers pre-filled. If both of the Services Available/Accessible questions are answered 'Yes,' then document narrative for 'Describe how CPS will manage/oversee the safety plan, including communication with the family and providers.'

37. From the Options drop-down, open the two templates associated with the Safety Assessment and Plan page: the Safety Assessment and the Safety Analysis and Plan.

38. Once you have completed the Safety Assessment, Analysis and Plan page, check the Completed checkbox, then click Save and Close to return to the Initial Assessment – Primary page.

39. If you have not done so already, open the IA Primary text template from the Options drop-down. Check the IA Completed checkbox, click Save and then Close. This will return you to the Basic tab of the Assessment page.

40. Verify the information on all tabs is complete, then proceed to the Participants tab for Approval.

41. If during the Initial Assessment a new CPS Report is screened in, you can link that CPS Report to this assessment. From the Participants tab, select Link Report to Assessment from the Options drop-down and click Go.

On the Assessment Report Link page, select the appropriate CPS Report(s) and then click Continue. This will automatically associate the CPS Report to this Assessment and return you to the Assessment page.

42. From the Participants tab, select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button and click Continue. You are returned to the Assessment page. Click Save to send the assessment to your supervisor for approval.

43. You will be reminded to complete the questions on the Screening tab of the ICWA Record.

eWiSACWIS -- Webpage Dialog

Please complete the questions on the Screening tab of the ICWA Record and launch
the Screening for Child's Status as Indian document.

Close
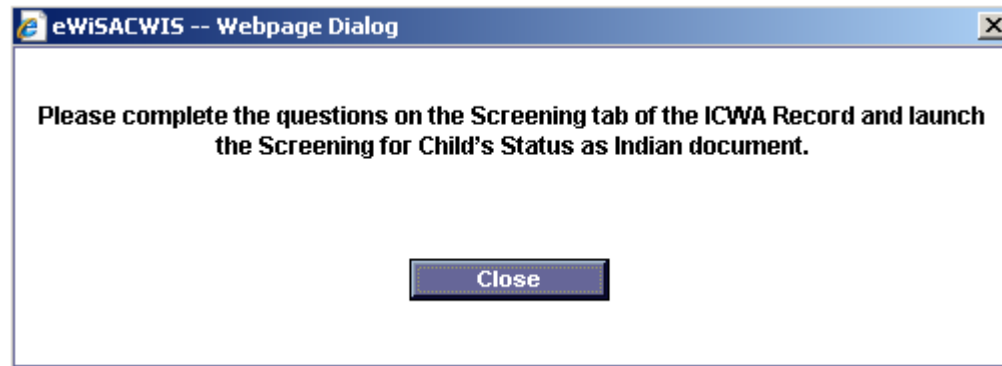
44. To create or view an ICWA record for a child, click the Create/View ICWA Record hyperlink at the
lower left of the Participants tab on the Assessment page (see step 5 above). For more information
regarding completing the ICWA Record, see the Documenting ICWA Quick Reference Guide.

Switching an Initial Assessment Type

If an incorrect type of Initial Assessment (e.g. IA Primary or IA Secondary) has been entered, it can be switched prior to approval. As different information is collected based on the type of Initial Assessment, most information will not 'copy' over when switched; rather this allows you to replace the original Initial Assessment with the correct IA type.

1. Once an Initial Assessment has been entered and saved, 'Switch Assessment Type' will appear on the Options drop-down of the Basic tab on that IA. To switch the IA type, select 'Switch Assessment Type' and click Go.

2. The following message will display. To continue click 'Yes'.
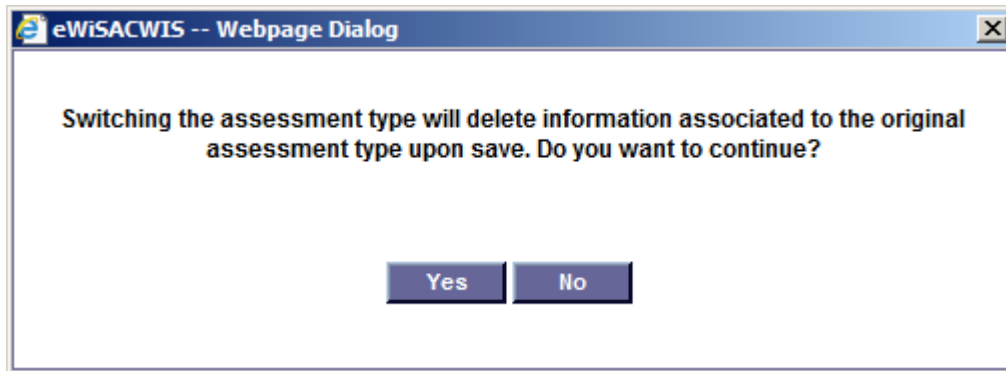
3. The opposite type of Initial Assessment will automatically be launched. So, if an IA Primary was originally entered, the IA Secondary will automatically be launched, and vice versa.

4. Enter information for that IA type and Save when finished.

Recording a Date of Death for a Child

A date of death for a child can be recorded on the following pages: Person Management, Allegation (Access Report),   Allegation (Assessment), Serious Incident Notification, and Placement & Service Ending.

In Assessment, the field will dynamically display if a death is indicated on the page and is required when a determination other than pending is selected. If a Death Date is already entered on Person Management, the date pre-fills to the page. If a Death Date is changed on the Allegation page, Death Date on Person Management will be updated after the Assessment is approved. The Death Date field will always remain editable on Person Management but will freeze on the Assessment and will not be able to be changed after it has been approved.

Note: The Death Date on an approved Access Report or Assessment, or the most recently entered date of death in Person Management will prefill to the Serious Incident Notification. The Death Date field displays when the Death/Alleged Maltreatment or Death/ Alleged Suicide checkbox is selected on the page.

Creating the 90-Day Summary Report for Child Death, Serious Injury or Egregious Incident

Once DSP has identified that an incident qualifies as a serious incident, eWiSACWIS automatically generates a 90-Day Summary Report Serious Incident tickler on the Primary worker's desktop. The tickler due date is 60 days from the date DSP indicates 'Yes' under the Serious Incident Verification expando on the Serious Incident Notification page.

1. To launch the 90-Day Summary Report, open the associated Serious Incident Notification under the case (either from Access Reports or Assessment). On the Serious Incident Notification page, select 90-Day Summary Report from the Options drop-down and click Go. This opens the Notices History page.

2. On the Notices History page, click the 'Insert' button to create a new report. Click the Edit hyperlink to launch the template.

Notices History -- Webpage Dialog

eWiSACWIS　　　　　TM　🌐 Print 🖨　Spell Check ✔　Help ❓

Case: Oconomowoc, Mother (9222162)

Document: 90-Day Summary Report for Child Death, Serious Injury or Egregious Incident

History

Document Created By :	Date Created	Sent		
Cake, Caitlin M.	06/07/2013	☐	Edit	Delete

Edits/Views 90-Day Summary document

[Insert]

[Save]　[Close]

3. Enter the required information and click Close and Return to eWiSACWIS.

90-Day Summary Report for Child Death, Serious Injury or Egregious Incident

Reports submitted to the Division of Safety and Permanence (DSP) that do not include all of the required information will be returned to the agency for proper completion. Do not identify individuals by name when completing this report. Individuals may be referenced by relationship or position; e.g., mother, father, child, sibling, physician, detective, etc.

Case Tracking Number: 123456   **Agency:** Milwaukee

Child Information (at time of incident)
Age: 7   Gender: ☐ Female ☒ Male
Race or Ethnicity: White, Caucasian
Special Needs:

Date of Incident: 02/28/2012

Description of the incident, including the suspected cause of death, injury or egregious abuse or neglect:
Describe here...

Findings by agency, including maltreatment determination and material circumstances leading to incident:

☐ Yes ☐ No   Criminal investigation pending or completed?
☐ Yes ☐ No   Criminal charges filed? If yes, against whom?

Child's residence at the time of incident: ☐ In-home ☐ Out-of-home care placement

Complete the appropriate following section (A. or B. based on the child's residence at the time of the incident).
A.   **Children residing at home at the time of the incident:**

Description of the child's family (includes household members, noncustodial parent and other children that have visitation with the child and / or in the child's family home):

☐ Yes ☐ No   **Statement of Services:** Were services under ch. 48 or ch. 938 being provided to the child, any member of the child's family or alleged maltreater at the time of the incident, including any referrals received by the agency or reports being investigated at time of incident?

If "Yes", briefly describe the type of services, date(s) of last contact between agency and recipient(s) of those services, and the person(s) receiving those services:

Summary of all involvement in services as adults under ch. 48 or ch. 938 by child's parents or alleged maltreater in the previous five years: (Does not include the current incident.)
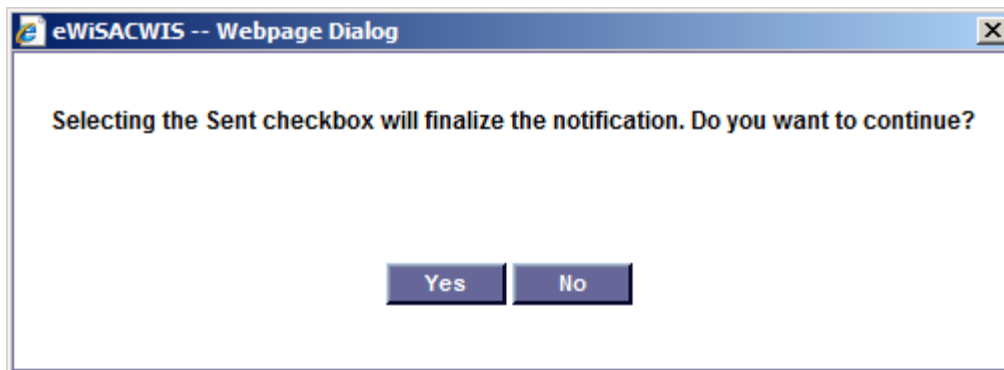
4. On the Notices History page, click Save. The Sent checkbox will now be selectable. If you are ready to send the report, click the Sent checkbox.

Case: Oconomowoc, Mother (9222162)
Document: 90-Day Summary Report for Child Death, Serious Injury or Egregious Incident

History

Document Created By :	Date Created	Sent		
Cake, Caitlin M.	06/07/2013	☐	Edit	

You will then receive the following message. Click Yes if you want to finalize and send the report.

eWiSACWIS -- Webpage Dialog   ✕

Selecting the Sent checkbox will finalize the notification. Do you want to continue?

Yes   No

5. The checkbox is now frozen. When the report is finalized, an e-mail is sent to DSP to notify them that a report has been submitted.